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CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT AUGUST 14 1989

WHY BASIC NETS ARE BUYING HOURS

WILL SIKES CHANGE FCC'S CABLE VIEW?

NBC ADOPTS A GLOBAL AGENDA

TEXAS UTILITY HIKES POLE RATES FOR FIBER

MARKETING IN THE '90S— BEYOND NUMBERS TO ATTITUDES AND AWARENESS

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CTAM Chairman David Van Valkenburg, Vice Chairman John Reardon and President Margaret Durborow

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Photo by Arnie Adler

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Beyond numbers to attitudes

Marketing in the '90s will require increased awareness and attitudes, say CTAM's David Van Valkenburg, John Reardon and Margaret Durborow

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On how much pay subs are willing to spend:

Durborow: I think that we as an industry are beginning to get very price/value conscious. I know for a fact a lot of MSOs are really evaluating their pricing structures on pay. It used to be that pay was a product that people couldn't get anywhere else, it's the first time that they got movies into the home. Well, we all know that the product on pay today is available at video stores, it's available on pay-per-view, and it is no longer perceived as valuable in many homes. In homes that don't have VCRs, it is still as valuable as it ever was. And so, a lot of MSOs are looking to see what is the price/value ratio. Maybe $12.95 is too much for a pay service, maybe it should be priced differently. That kind of flexibility is smart. It is not unique to our industry, but every other major marketing-focused industry. Look at the price of televisions when they first came out—$500, $600, $700. Look what you can buy a color TV set for today. The price/value changed. We are constantly in transition. No, I don't think pay has matured, everybody is saying pay has matured, I'm not sure it has. Maybe it's matured in its present life, its present configuration.

On the possibility of repackaging or retiering:

Reardon: Well, clearly it's an experiment. We don't think that would be the outcome. We think the majority of the homes are

Can a rising tide in affiliate fees lift all cable boats?

By Wayne Friedman and Robert O'Brien

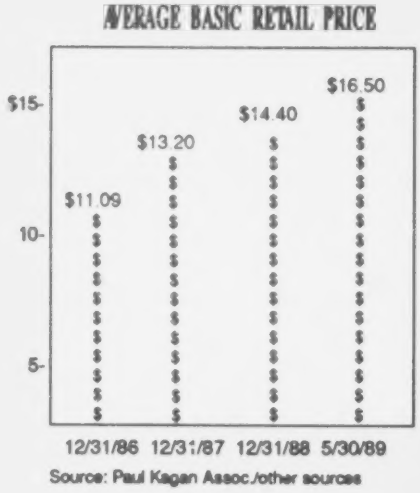
Conceding that rising programming costs have resulted in improved programming, cable operators now believe that the prices they pay programming services have hit their peak, and are asking programmers to curb future increases in their license fees.

"License fees paid to programmers are by far the largest sector of subscriber-related costs," says John Mathwick, group vice president of marketing at Jones Intercable. "It's now our highest cost item."

Prices for programming have escalated since the advent of deregulation eased constraints on the way operators package basic service, and how much they could charge subscribers for those packages. The owners of programming services subsequently raised the prices they charge operators, increases that, in part, erased the artificial pricing levels in force since the beginnings of the industry, while also fueling programmers' ambitious agenda of boosting the quality and quantity of their fare.

Overall, basic cable networks took in $1.4 billion in 1988, an increase of $250 million over the previous year, and almost double the 1985 total, according to results tallied by Veronis, Suhler & Associates, an investment banking firm that publishes annual surveys of media economics. Of that figure, two thirds—$910 million—came from advertising sales. The rest—$480 million—came from the fees programmers charge cable operators. By contrast, operators paid programmers $365 million in 1987, and $235 million—less than half the 1988 total—in 1986.

Because programmers negotiate contracts with individual cable operators, MSOs' increases have varied. Mathwick at Jones said the fees his company paid its 22 "core" programming services increased 65 percent on a per-subscriber basis in 1988, a figure that reflects both increases in the number of services offered and also the prices charged by each



Source: Paul Kagan Assoc./other sources

of those services.

Michael Egan, vice president of programming at Cablevision Industries, reports that the MSO's costs for programming, on a per-subscriber basis, have risen 100 percent in the last two years, and that the company is now paying 250 percent more for basic programming than it did in 1986.

John Malone, president and chief executive officer of Tele-Communications Inc., told a gathering of media executives earlier this year that TCI's costs for basic programming have risen over 400 percent since 1985, increases attributed in part to additions in the number of services and the number of subscribers.

Operators said they have tolerated the escalation of programming prices in recent years, because of their sensitivity to programmers' desires to ameliorate the effects of artificial price caps in the years before deregulation, and as a means of fostering programmers' determination to improve the quality of programming. Improved programming, they noted, helped drive marketing pushes that bolstered penetration and focused consumer awareness on the variety and quality of cable-only programming.

"There was a feeling that some programmers needed a shot in the arm in the mid-'80s," says Brian Roberts, executive vice president of Comcast Corp.

"In all honesty, we're not complaining about previous increases," says Cable-

TOP AFFILIATE PER-SUB FEES
(Listed in cents/Selected cable networks)

	1988	1989	1990
*ESPN	28	28	28
CNN	28	30	30
MTV	22	22	22
TNN	15	15	20
USA	13	18	23
Lifetime	10	11	12
Discovery	5	6	7
BET	3	5	6
TNT	0	15	20

Sources: Paul Kagan Associates and others
*ESPN fee does not include NFL football surcharge

vision's Egan, a statement that is echoed by a number of executives from other companies, who concede that current slates of programming reflect the improvements operators underwrote.

"I mean, there were several factors contributing to the price increases in recent years," says Rob Stengel, senior vice president of programming at Continental Cablevision. "Not the least of which was that cable operators were willing to allocate more money for better programming."

During the period of most rapid price appreciation, most operators simply passed costs on to subscribers. While there was little upheaval at the time, recent marketing initiatives have recognized a higher degree of price sensitivity on the part of cable subscribers.

In addition, operators said, the cumulative effects of rate increases have exacerbated tensions between the industry and legislators, leaving operators, who are determined to avoid circumstances that would fuel competitors' calls for reregulation, disinclined to pass through additional cost increases.

"It's not pleasant to have to raise prices above the level of the consumer price index," says Jones' Mathwick.

"It's bad business for programmers to keep raising rates," says Marc Nathanson, president of Falcon Cable. "It's a suicidal course."

But if program costs are headed north, no one should be surprised, most programmers say.

Growth in programmer revenues have come from three areas: From new services such as The Discovery Channel, TNT, CNBC and American Movie Classics; from rate increases by existing channels; and from MSOs' own expansion—more subscribers mean more gross affiliate fee costs.

While not disputing the other two reasons for increased programming expenses, many programmers say existing rate increases aren't out of line with what new programming has added in creating value to the viewer. "Operators complain a good bit about that. However, we need to take a price increase every year just like cable operators take a price increase every year," says Sandy McGovern, senior vice president of affiliate sales and relations for The Discovery Channel. In addition, McGovern thinks that at a current top rate card of 6 cents a subscriber, The Discovery Channel is a good buy, compared with other, more mature networks.

She is not alone in that claim. "USA Network is the most unvalued network," says Douglas Holloway, the network's vice president of affiliate relations. He says the evidence has been clear since 1983. "We have been responsible for 34 percent of basic cable's growth in ratings (in cable homes)," he says.

Program network executives, in fighting off operators complaints about higher programming costs, say one needs to keep a broader picture of the entire cable revenue environment in mind. "It's true that basic programming costs have increased more than $1, but (some) operators have increased basic $6 to $7 a month," says Roger Williams, vice president of affiliate relations for ESPN. "That's not a bad return."

Since basic programming shares of audience have grown steadily over the last few years—now totalling 15 percent of total U.S. television viewing— ESPN's Williams believes the cost justifies the value. "(Increased basic cable viewing) means subscribers paying those monthly bills are watching these basic channels. That reemphasizes that it's programming driving penetration and helping support retail pricing."

But operators also challenge programmers on rate increases that coincide with

going to take the full complement of services because, as Margaret pointed out, the value of basic cable has been demonstrated better than ever before. Many of the cable operators have changed their market behavior to focus on selling basic cable into the home as the bread and butter. Those services have gotten better because they've invested so much more in the programming, put their quality on the screen. The demand is there. I think one of the things that the Family Decision-Making Survey is going to point out is that there are many different influences in a home that dictate the way cable is purchased, whether it's the kids who want Nickelodeon because all the kids in their school have Nickelodeon, or the teens and young adults who want MTV, or somebody who wants a pay service or The Discovery Channel, or the working woman in the home who wants Lifetime. Because of all these separate demands, it seems to me that the entire package of basic cable services is going to prevail. I don't see a backwards shift towards tiering in packages. I think the only logic for tiering to begin with, as we all know, was the requirement to get around local regulation, and I don't believe we're going to revisit pre-1984.

Van Valkenburg: Two comments. No. 1 is the importance of product knowledge and training for our customer service and sales representatives,

installers and technicians. It must be there at the point of acquisition, when you do a direct-mail campaign, and especially when people call in. It requires detailed product knowledge, and therefore product training for that CSR to 1) be sure they understand what product they're buying, but 2) to sell an HBO or a Showtime or a Disney, or other services, such as additional outlets and impulse pay-per-view. It takes that kind of training, and that's very, very important as far as increasing the revenue we get per customer, and also our pay-to-basic ratio. So that's a very, very important factor. The other point I'd like to make as far as tiers are concerned is I do see, in some markets, the need for a broadcast tier at a lower price in order to: 1) increase saturation, but 2) to react to some of our political and government relation issues. I've seen requests for a lower-priced broadcast tier during franchise renewals. I don't see the major bulk of my customers taking it, because we've got such a fantastic cable product. But I do see that, in some markets, a request and a need.

On leaving Paragon for Cablevision Industries and the companies' different marketing philosophies:

Van Valkenburg: Philosophically, the major difference is that Paragon is very decentralized. Historically, Cablevision Industries has been very

increases in penetration and distribution. "The gross dollars received by programmers are going up," said Comcast's Roberts, who points out that programmers' costs are basically fixed. New subscribers, which operators credit in part to improvements in their own marketing efforts, should play a larger role in satisfying programmers' desires for increased revenue, while constraining increases on a per-subscriber basis, Roberts suggested.

Some programmers say rate increases by themselves do not raise the ire of operators. "The biggest problem an operator has is not a rate increase, but the unpredictability of it," says Lloyd Werner, senior vice president of sales and marketing for Group W Satellite Communications, which markets and sells The Nashville Network, Home Team Sports and Request Television.

This isn't true for The Nashville Network, however. Werner says operators know exactly what they'll pay throughout the length of their contracts. With its new five-year contracts, for instance, TNN affiliate fees run 15 cents in 1990, 15 cents in '91, 20 cents in '92, 20 cents in '93, 25 cents in '94, and 25 cents in '95.

"We have never gone back to anybody (and renegotiated)," says Werner. "We are able to control our costs to such an extent that we can tell you how much it'll cost to run TNN in the year 2000." TNN is, indeed, in a different mode. It doesn't buy from Hollywood and artists appearing on TNN work for scale wages.

And TNN isn't alone in that regard. A&E spells out exact increases in its existing contracts as well. But there are those that don't. Other networks can't predict what their exact revenue needs will be in the out years, considering the unpredictable nature of programming costs, sports rights fees and other expenses. ESPN and USA Network's are just two networks that don't spell out exact rate increases. The language in their contracts states that the network reserves the right to raise affiliate fees during the course of the contract.

In 1989, USA Network's affiliate fees jumped from 13 cents to 18 cents per subscriber. For that reason and his stated dislike of the programming was why Glenn Jones, the head of Jones Intercable, tossed USA off the MSO's systems. But no other MSOs followed. Why? Many consider Jones a renegade and believe his action was meant to demonstrate his programming philosophy.

Future negotiations with operators could get tougher, however.

"We, as cable operators, have to be prepared to dislocate services that make unreasonable increases," says Continental's Stengel. "Fundamentally, nobody wants to take services off their system," he adds, but notes that, with increasing demand for channel capacity coming from new services, operators have been more scrupulous in analyzing the benefits of each service that's carried.

Still, operators recognize that dropping an established service is disruptive, to their own systems, to programmers, and—most visably—to subscribers. When Cablevision Systems Corp. blacked out New York Yankees baseball games, the move prompted state legislation that would penalize operators that remove programming, and it gave the company—and the industry—a public relations black eye that is likely to handicap the company's ability to market cable services.

Operators say programmers recognize the limited flexibility they have in pulling an established service from the lineup. "Programming services operate from a position of significant strength," Stengel observes.

The problems, some operators note, can be more acute with established services that subscribers perceive to be the core elements of basic programming: news, music and sports services that draw the widest audiences. "Some of them, once they've become successful, tend to forget their friends," said Falcon's Nathanson.

MSOs heads complain about what they perceive as healthy profits of the networks and, with their enormous leverage, may try to take advantage of these gains. "If we don't see license fees rolled back as these networks become successful, then we are going to see some sort of profit sharing plan with ad sales," predicts Larry Gerbrandt, senior analyst for Paul Kagan Associates. "Cable keeps looking back at the way broadcast networks do business

with their affiliates." He adds that broadcast network compensation for network affiliates is just another name for ad sales rebates. To help pave their way to launch, newer services such as The Discovery Channel, Movietime and CNBC all offered advertising rebates.

Most networks, particularly established services, bristle at any suggestion of ad rebates. "If they give me a percentage of basic sub fees, I'll give them a percentage of ad sales," is the sentiment expressed by two network executives. Others are more sanguine. "We have no plans to do that," says Dan Davids, vice president of affiliate relations for A&E Network. Likewise, USA's Holloway says "No. Definitely not. The only way we can continue to deliver the quality and volume of quality is to have full control over our two revenue streams."

If concessions in future contract deals with MSOs don't come from ad sales rebates, it could in the form of more avails. Older, established networks, such as Lifetime and USA Network, offer two minutes of local avails. But newer networks, in an attempt to gain shelf space, all lure operators with three minutes of local avails, with TNT topping the list by giving away four minutes locally. Still, network executives don't think they'll have to bargain away more avails in future affiliate deals.

"The point is they aren't maximizing the minutes that they have," says USA's Holloway. "There is no real value in having that extra minute. In most cases, they are not selling out that extra minute." A&E's Davids agrees. But to help operators sell A&E effectively the network hired a local ad sales executive. One negotiating ploy on the side of networks is that they are moving away from volume discounts. USA has been slowly converting all its contracts to eliminate volume discounts with MSOs such as Continental, Telecable, Times Mirror and Warner Cable. Others also are considering such measures.

Operators said they recognize the same trend. "It's the natural order of things," notes Comcast's Roberts. "When the industry was more entrepreneurial, rates were all over the place." With the industry's maturation, rates have stabilized, and MSOs expect to be held to established rate cards, executives said.

There is no doubt that programming costs are climbing. "As long as you are getting sub fees, the advertisers are willing to pay their fair share," says Group W's Werner. "The greatest fear programmers have is cable operators saying I'm not going to pay anymore."

Operators are fearful themselves. "They are trying to maintain their margins," says Seymour Kaplan, senior vice president of affiliate relations for Lifetime. "It's really a recognition that we have prospered. If we curtail programming costs, we will lose our viewership, and go back to the early days of cable." ■

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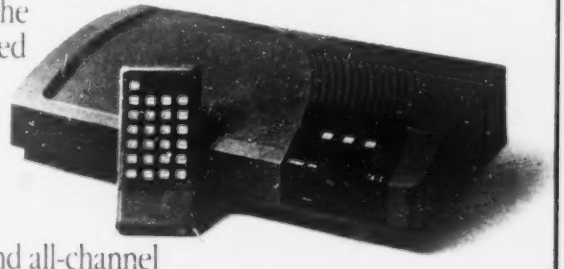

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Classic systems focus on pay-to-basic

A wide disparity in marketing strategies exists between larger but less penetrated systems—which principally are focused on pushing basic—and the smaller but highly-penetrated classic systems, which are geared toward squeezing growth from regaining former subs and raising their pay-to-basic ratios, an analysis of Cable Poll™ data indicates.

This clear distinction shows up in the relative importance that Cable Poll™ respondents attach to the broad marketing categories of regaining former subscribers, obtaining new subs and upgrading current customers. At systems with more than 50,000 subs—which experts say contain a high number of newer, urban franchises—managers attach more than twice as much importance, by 59 percent to 25 percent, to increasing penetration by obtaining new subs than to raising pay-to-basic.

A far different marketing focus has been adopted by systems with less than 10,000 subs, a category that experts say contain many older, highly-penetrated systems. While gaining new subs remains an important marketing function at such classic systems, raising pay-to-basic is a nearly equal marketing focus.

Number 10 in a series of ten

This divergence of strategies is further illustrated by the methods the larger and smaller systems principally employ to obtain their marketing goals. The highly-penetrated smaller systems are less reliant on direct mail than their big-city counterparts, by 25 percent to 38 percent, respectively.

"This data tracks exactly with our experience in the marketing objectives of highly-penetrated, more mature systems and the newer, urban systems," said CTAM President Margaret Durborow. "In an urban environment, the mandate is to raise penetration, and that drives their marketing. Your higher penetration systems tend to have low pay-to-basic, and that drives their marketing, because that's (pays) all they have to sell."

The Cable Poll™ is a sampling of industry opinion conducted on a regular basis by Ryan/Samples Research Inc for Midwest CATV and *CableVision* magazine. Telephone interviews for this edition of the poll were conducted March 13-23; a total of 400 interviews were completed using a listing of system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are accurate within plus or minus 4.9 percentage points. ■

What is the primary focus of your marketing efforts?

	Overall-All Systems	Less Than 10K Subs	More Than 50K Subs
Regaining Former Subs	10%	8%	16%
Obtaining New Subs	49%	48%	59%
Upgrading Current Subs	35%	36%	25%

What method do you most often rely on to achieve your marketing goals?

	Overall-All Systems	Less Than 10K Subs	More Than 50K Subs
Direct Mail	28%	25%	38%
Local Newspapers	19%	20%	9%
Door-To-Door	13%	13%	13%
Telemarketing	8%	10%	6%
Your Own System	12%	12%	6%

What method is your second choice?

	Overall-All Systems	Less Than 10K Subs	More Than 50K Subs
Direct Mail	20%	20%	16%
Local Newspapers	30%	30%	28%
Radio	13%	13%	6%
TV	3%	1%	16%
Door-To-Door	11%	10%	6%
Telemarketing	8%	7%	9%
Your Own System	9%	8%	16%

Top 100 MSO's

Rank	Multiple system operator	Basic subs					
1.	Tele-Communications Inc.	6,228,526	(6/89)	(54) 53.	Armstrong Utilities	151,800	(3/89)
2.	American Television & Communications Corp.	4,100,000	(4/89)	(55) 54.	King Videocable	141,158	(1/89)
3.	UA Entertainment	2,642,729	(6/89)	(56) 55.	Northland Communications	137,148	(4/89)
4.	Continental Cablevision	2,404,000	(5/89)	(57) 56.	Summit Communications	136,600	(3/89)
5.	Warner Cable Communications	1,596,000	(6/89)	(58) 57.	Bresnan Communications	127,351	(1/89)
6.	Storer Cable Communications	1,530,700	(1/89)	(59) 58.	Booth Communications	119,000	(1/89)
7.	Cox Cable Communications	1,501,500	(4/89)	(60) 59.	Sonic Communications	117,551	(5/89)
8.	Comcast	1,463,000	(5/89)	(61) 60.	McDonald Group	115,200	(4/89)
9.	Cablevision Systems	1,374,736	(7/89)	(62) 61.	Susquehanna Broadcasting	113,200	(2/89)
10.	Jones Intercable/Spacelink	1,188,298	(5/89)	(63) 62.	United Video Management	106,000	(3/89)
11.	Newhouse Broadcasting	1,147,000	(5/89)	(64) 63.	Pencor Services	100,400	(2/89)
12.	Heritage Communications	1,100,000	(4/89)	(65) 64.	First Carolina Communications	99,500	(3/89)
13.	Times Mirror Cable TV	997,156	(1/89)	(66) 65.	Midcontinent Cable Systems Co.	95,550	(6/89)
(15) 14.	Cablevision Industries	962,650	(8/89)	(67) 66.	WEHCO Video	93,900	(4/89)
(14) 15.	Viacom Cable	955,000	(4/89)	(69) 67.	Colbert Media	85,000	(6/89)
16.	Sammons Communications	853,900	(4/89)	(70) 68.	Coastal Communications	80,000	(5/89)
17.	Century Communications	800,000	(4/89)	(71) 69.	Selkirk Communications	77,500	(3/89)
18.	Cooke Cablevision	730,800	(5/89)	(72) 70.	James Cable Partners	70,000	(4/89)
19.	Adelphia Communications	721,700	(5/89)	(73) 71.	Douglas Communications	64,100	(3/89)
20.	Paragon Communications	703,000	(1/89)	(74) 72.	Barden Cablevision	62,700	(3/89)
21.	Falcon Cable TV	632,500	(3/89)	(75) 73.	Cardinal Communications	60,500	(6/89)
22.	Centel Cable	598,546	(5/89)	(68) 74.	Omega Communications	60,000	(8/89)
23.	Telecable	580,000	(5/89)	(87) 75.	Helicon Corp.	59,000	(8/89)
(25) 24.	WestMarc Communications	569,913	(6/89)	76.	C-TEC Cable Systems	58,600	(5/89)
(24) 25.	KBLCOM	558,100	(4/89)	77.	Hearst Communications Of California	58,200	(5/89)
26.	Scripps-Howard	531,000	(3/89)	78.	Fanch Communications	58,000	(6/89)
27.	Multivision Cable TV	482,000	(4/89)	79.	Prestige Cable TV Inc.	57,500	(3/89)
(29) 28.	Prime Cable	458,000	(6/89)	80.	Telesat Cablevision Inc.	57,235	(6/89)
(30) 29.	Post-Newsweek Cable	403,000	(4/89)	81.	State Cable TV	54,700	(5/89)
(28) 30.	Tele-Media	381,951	(6/89)	(86) 82.	Leonard Communications	53,000	(8/89)
31.	Lenfest Group	365,918	(5/89)	(84) 83.	Buchow & Elkin Communications	51,700	(1/89)
32.	Maclean Hunter Cable TV	357,500	(5/89)	(85) 84.	Galaxy Cablevision	51,700	(3/89)
33.	TCA Group	349,300	(4/89)	(82) 85.	Joseph Gans Cable TV	50,000	(8/89)
34.	Rifkin & Associates	324,000	(4/89)	(88) 86.	New England Cablevision	49,000	(4/89)
35.	Multimedia Cablevision	321,300	(4/89)	(89) 87.	Republic Communications Corp.	48,000	(5/89)
36.	Colony Communications	312,900	(4/89)	(90) 88.	Rock Associates	47,500	(3/89)
37.	TKR Cable	278,482	(5/89)	(91) 89.	Donrey Media Group	47,500	(3/89)
38.	Triax Communications	277,500	(6/89)	(92) 90.	360 Corp.	45,000	(5/89)
39.	Western Communications	266,700	(4/89)	(93) 91.	CableSouth Inc.	42,100	(2/89)
40.	Cencom Cable	258,980	(7/89)	(94) 92.	CableAmerica	42,000	(2/89)
41.	Star Cablevision Group	254,000	(1/89)	(new) 93.	Masada Corp.	42,000	(8/89)
(43) 42.	Hauser Communications	247,000	(7/89)	(98) 94.	Star Cable Associates	42,000	(8/89)
(42) 43.	Simmons Communications	246,690	(1/89)	95.	Eastern Connecticut Cable TV	41,820	(6/89)
(45) 44.	Service Electric Cable TV Inc.	211,500	(4/89)	96.	Cable Holdings Inc.	41,800	(3/89)
(46) 45.	Greater Media	188,700	(3/89)	(new) 97.	C4 Media	41,275	(7/89)
(47) 46.	Harron Communications	177,700	(3/89)	(97) 98.	Acton Corp.	40,400	(3/89)
(50) 47.	Media General	176,068	(6/89)	99.	Fairbanks Communications	36,400	(3/89)
48.	Sutton Capital	174,060	(6/89)	100.	ParCable	36,142	(5/89)
49.	Columbia International	174,000	(4/89)				
(51) 50.	Palmer Communications	160,551	(5/89)	**( ) Rank last listing**			
(52) 51.	Insight Communications	157,700	(4/89)				
(53) 52.	U.S. Cable Corp.	154,300	(3/89)				

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.*

Top 100 Systems

Rank	Location	Operator	Basic subs							
1.	Long Island, NY	Cablevision Systems	472,849	(7/89)	51.	Chicago Suburbs, IL	Centel	109,576	(5/89)
2.	San Diego, CA	Cox Cable	301,765	(4/89)	52.	Las Vegas, NV	Prime Cable	107,288	(5/89)
3.	Orlando/Melbourne, FL	ATC	298,000	(2/89)	53.	Dallas, TX	Heritage	107,244	(6/89)
4.	San Antonio, TX	KBLCOM	234,855	(6/89)	54.	San Juan, PR	Multivision Cable	106,046	(6/89)
5.	Manhattan, NY	ATC	231,964	(6/89)	55.	Jefferson Parish/Kenner, LA	Cox Cable	105,851	(3/89)
6.	Puget Sound, WA	Viacom	225,800	(6/89)	56.	Indianapolis, IN	Comcast	104,000	(6/89)
7.	Phoenix, AZ	Times Mirror	220,968	(5/89)	57.	Raleigh/Durham, NC	ATC	104,000	(1/89)
8.	East Orange, NJ	Maclean Hunter	212,000	(6/89)	58.	Boston/Brookline, MA	Cablevision Systems	102,274	(6/89)
9.	Houston, TX	Warner	207,000	(6/89)	59.	Orange County, CA	Times Mirror	101,922	(5/89)
10.	Honolulu, HI	ATC	202,000	(1/89)	60.	Nashville, TN	Viacom	101,500	(6/89)
11.	Dover/Morristown, NJ	Sammons	178,336	(6/89)	61.	Hillsborough/Tampa, FL	Paragon	100,281	(2/89)
12.	Chicago (suburbs), IL	Continental	177,208	(2/89)	62.	Chicago, IL	Group W	98,700	(5/89)
13.	Cleveland, OH	Cablevision Systems	175,848	(7/89)	63.	Richmond, VA	Continental	97,935	(1/89)
14.	Wayne, NJ	UA Entertainment	174,173	(6/89)	64.	Jackson, MS	ATC	97,000	(1/89)
15.	Cincinnati, OH	Warner	167,000	(6/89)	65.	Pittsburgh, PA	TCI	96,712	(1/89)
16.	Rochester, NY	ATC	167,000	(1/89)	66.	St. Petersburg, FL	Paragon	95,412	(2/89)
17.	Atlanta, GA	Prime Cable	166,329	(5/89)	67.	Monmouth, NJ	Sutton Capital	94,970	(6/89)
18.	Fairfax, VA	Media General	164,519	(6/89)	68.	Naples, FL	Palmer	94,450	(6/89)
19.	Louisville/Jeff. Co., KY	Storer Communications	163,722	(1/89)	69.	Reading, PA	ATC	94,000	(1/89)
20.	Hampton Roads, VA	Cox Cable	162,964	(3/89)	70.	Worcester Complex, MA	Greater Media	92,148	(1/89)
21.	Cherry Hill, NJ	NYT	162,000	(1/89)	71.	Milwaukee, WI	Warner	92,000	(6/89)
22.	Connecticut Complex	Cablevision Systems	156,468	(7/89)	72.	Portland, OR	KBLCOM	91,500	(8/89)
23.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)	73.	Greensboro, NC	ATC	91,000	(1/89)
24.	Hartford/Plainville/Vernon, CT	UA Entertainment	152,683	(6/89)	74.	Dade/Broward County, FL	Storer	90,000	(8/89)
25.	Chicago, IL	TCI	148,857	(4/85)	75.	Independence, MO	Jones	88,628	(8/89)
26.	Memphis/W. Memphis, TN	ATC	148,000	(1/89)	76.	Wichita, KS	Multimedia	87,351	(1/89)
27.	Kansas City, MO	ATC	147,000	(2/89)	77.	Tucson, AZ	Cooke	86,976	(8/89)
28.	San Jose/Campbell, CA	Heritage	145,000	(6/89)	78.	Harrisburg, PA	Sammons	85,200	(8/89)
29.	Baltimore County, MD	Comcast	144,000	(6/89)	79.	Columbus, OH	Warner	85,000	(6/89)
30.	Manhattan, NY	Paragon	143,500	(6/89)	80.	Baton Rouge, LA	UA Entertainment	84,976	(6/89)
31.	Tulsa, OK	UA Entertainment	140,015	(6/89)	81.	Fresno, CA	Continental	84,217	(6/89)
32.	Buffalo, NY	Adelphia Comm.	139,515	(8/89)	82.	Akron, OH	Warner	84,000	(6/89)
33.	Denver (suburbs), CO	UA Entertainment	139,303	(6/89)	83.	Albuquerque, NM	Jones Intercable	83,119	(5/89)
34.	Charlotte, NC	ATC	139,000	(1/89)	84.	Fayetteville, NC	ATC	83,000	(1/89)
35.	Pompano, FL	Continental	136,793	(2/89)	85.	South Bend, IN	Heritage	82,744	(6/89)
36.	St. Louis, MO	Cencom	135,039	(6/89)	86.	Houston Suburbs, TX	Prime Cable	82,000	(6/89)
37.	San Francisco, CA	Viacom	134,000	(6/89)	87.	Medford Complex	Warner	82,000	(6/89)
38.	Brooklyn/Queens, NY	Warner	132,500	(6/89)		Boston Suburbs, MA			
39.	San Diego, CA	ATC	132,000	(1/89)	88.	Orange County, CA	KBLCOM	81,604	(1/89)
40.	Martin/Stuart Co, FL	Centel	129,460	(3/89)	89.	Oakland County, MI	UA Entertainment	80,564	(8/89)
41.	Seattle, WA	TCI	120,518	(1/89)	90.	Indianapolis, IN	ATC	80,000	(1/89)
42.	Austin, TX	ATC	120,000	(1/89)	91.	Providence/Warwick, RI	Times Mirror	78,528	(6/89)
43.	Warren, NJ	TKR	118,987	(7/89)	92.	New Orleans, LA	Cox Cable	78,493	(3/89)
44.	Pinellas County, FL	Newhouse	114,000	(6/89)	93.	Allentown, PA	Service Electric	78,000	(8/89)
45.	Wilmington, DE	Heritage	112,000	(6/89)	94.	Oklahoma City, OK	Cox Cable	77,014	(3/89)
46.	Tacoma, WA	Viacom	112,000	(6/89)	95.	South Texas, TX	Heritage	75,560	(6/89)
47.	Grand Rapids, MI	UA Entertainment	111,198	(6/89)	96.	Pleasant Hill, CA	WestMarc	74,887	(6/89)
48.	San Diego County, CA	Times Mirror	111,029	(5/89)	97.	Omaha, NE	Cox Cable	74,472	(3/89)
49.	Toledo, OH	Blade Communications	110,785	(5/89)	98.	Little Rock, AR	Storer	74,274	(6/89)
50.	Southeast Michigan	Comcast	110,000	(6/89)	99.	Birmingham, AL	ATC	73,500	(5/89)
					100.	Flint, MI	Comcast	73,000	(6/89)